March, 2017

2016 British Columbia Golf Market

Introduction

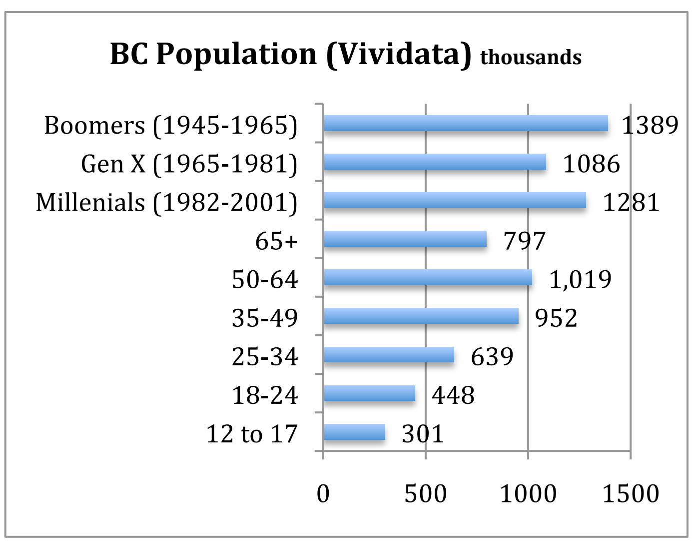
This Report uses Vividata research data comparable to the methodology used in the 2015 BC Golf Market Report. More information on the methodology is included that report as the methodology had changed from prior years. For more information, contact the author.

One important difference is that the 2015 Market Report was based on data collected representing the 2015 calendar year. However a decision was made to establish a new baseline of data using the third quarter results of each year so that this report is based on data obtained in the previous 12 months ending September 30, 2016. This means that there is some overlap in the data time frame from 2015, but the overlap includes the fourth quarter (October to December 2015) which is outside the normal BC golf season. Future annual market reports will be based on third quarter data to be compatible with this report.

It should also be noted that the definition of participation is based on playing golf in the past 12 months. Thus 2016 data reflects some play in the 2015 season. The data only includes responses from those 12+ years of age. The national sample size for this data is approximately 40,000 and the BC sample size reported is 4,821.

The BC Population

BC data is used as the base in this report, although comparisons can be made to other provinces and the national data to put some information in context if needed. The sample includes those 12+ years of age. The population base for this data is 4,157,000 BC residents comprised of 2,054,000 males and 2,103,000 females.



More detailed information on the BC population is available from BC Stats who also publish population projections. The 2015 report includes more population projections than in this report.

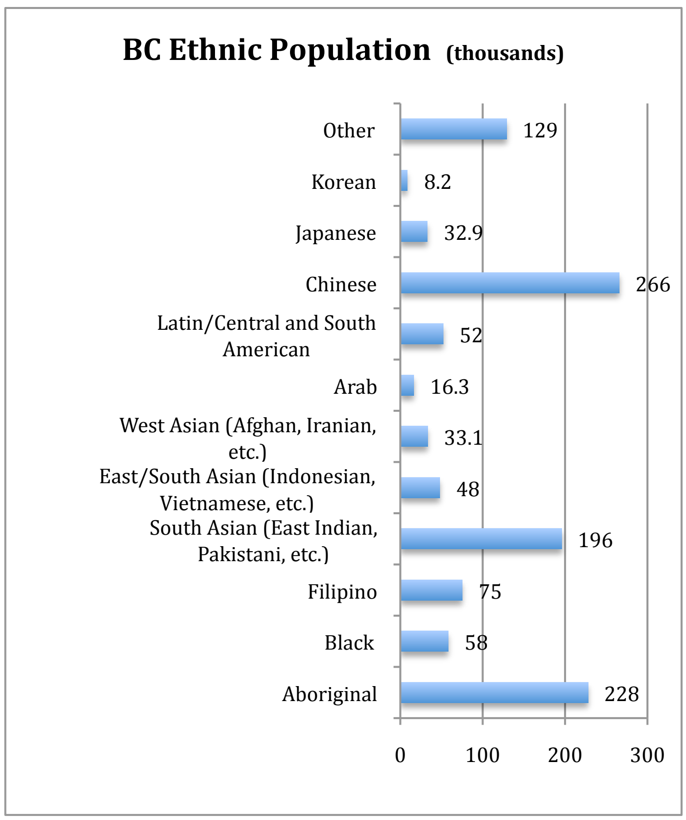
For the purposes of this report though, the age ranges and data used in the Vividata report will be used to allow for consistent representation.

The above chart shows the current BC population by age segment. Not all segments include the same number of years. As an example the youngest age segment only includes a span of 5 years, while the 65+ segment could include over 20 years.

Over the past number of years, data has shown a gradual increase in the older age segments as the "Baby Boom" generation ages and begins to enter retirement age. Each year it would be expected that there will be an increase in the 65+ age segment. By 2030 there will be over 1.1 million BC residents over the age of 65, an increase of 37% in a 15-year span.[1]

Many, if not most, marketing programs define their target markets by age generations. Significant differences have been found between generations, but within each of the three generations shown above, there are similarities. For the golf industry, the Baby Boom generation has been the most significant force in building the industry. The challenge will be generating the same level of interest and consumption in the younger generations, and this report will explore this issue in greater detail.

The importance of ethnicity in the BC population is increasing. Most of the increase in the BC population is coming from immigration, particularly from China and Asia. Immigration is having a profound effect on all aspects of BC society, from housing prices to politics. The actions by the government to place an additional tax on foreign owners in Vancouver is a good example of the impact.



Vividata suggests that there are 1,143,000 residents who describe themselves as being of ethnic origin, which is 28% of the population over the age of 12.

The Greater Vancouver region is the recipient region for most

[1] BC Stats data

immigrants and areas of the Lower Mainland can take on distinct ethnic flavors. As with age, ethnicity will be shown later to have an impact on the golf industry.

BC has a very diverse ethnic population. Canada's 2011 Census[2] determined that 2/3 of the BC population in 2011 was White with 27% coming from visible minorities representing a population of 1.18 million. Of these, the largest percentage was Chinese (10.1% of the BC population) followed by South Asian (7.2%)

The influx of immigrants (approximately 250,000 per year) to Canada, mostly (over 70%) from Asia, is responsible for most of Canada's increase in population. At least part of the increase in population also comes from the children of immigrants, as immigrants are younger and tend to have larger families than do Caucasians.

While the number of immigrants from other countries is easy to count, equally as important is Canada's ethnic mix. The children of immigrants, and to some extent the children of their children, retain at least some of their ethnic culture and religion. Some aspects of the culture and religion of some ethnic groups are quite different than those that are part of the historical culture of Canada. Canada's multi-cultural policies have encouraged ethnic groups to retain their culture and Canadians are generally accommodating to other cultures.

Of the BC population Of 4,157,000, 2.2 million live in the Vancouver Census Metropolitan Area (CMA) while 326,000 live in the Victoria CMA.

BC Golf Market Participation Trends

Participation rate is the percentage of a population that participates in an activity – in this case golf. Participation is defined by the respondent saying they had played golf at least once in the prior 12-month period. Using participation rates allows better comparisons between years and between different provinces and the national figure.

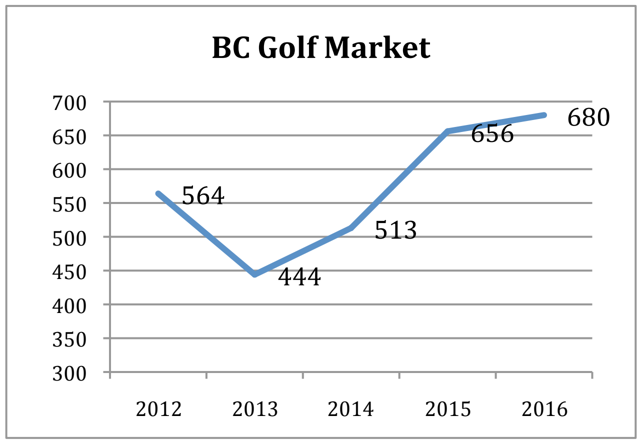
Prior to the 2015 data, BC Golf used data from the Print Measurement Bureau. As mentioned in the first section of this report, new data starting on the 2015 calendar year is

[2] Found in Wikipedia

provided by Vividata and the 2016 data is comparable. Although the different surveys cover the same information, comparisons with previous data should be made with caution.

Nevertheless, it is important to look at the long-term trend in golf participation in BC. Over the term since 2004 participation rates in BC have been cyclical peaking at approximately 16% in the 2004 to 2008 period. With the 2008 recession, participation declined to 11% but then recovered to approximately 15%, then declined again in 2013 to 10%. However, the last 2 years have seen participation increase to 16.4%, back to its highest levels.

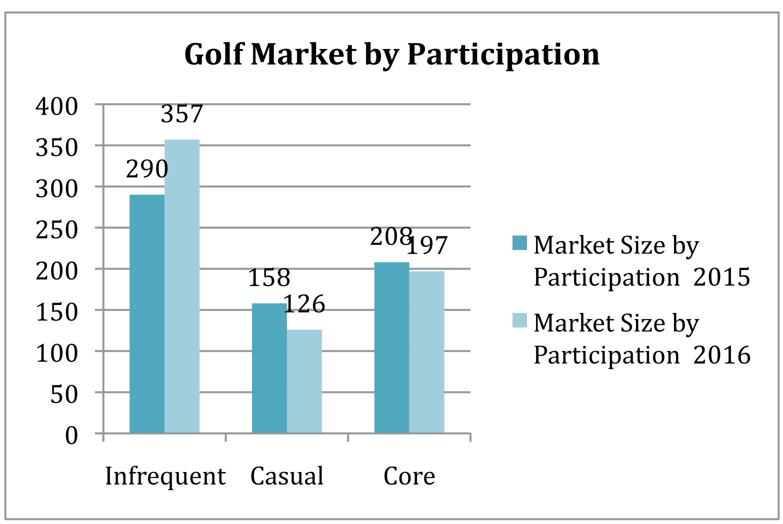
The participation rate multiplied by the size of the population provides the size of the golf market. The adjacent chart shows the size of the BC golf market over the past 5 years. This illustrates the rebound in the market from earlier years.



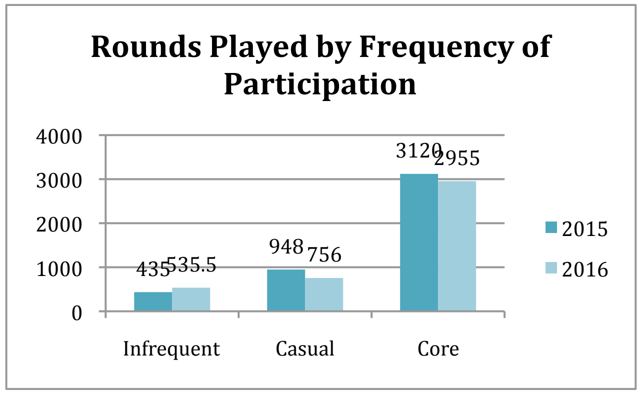
Ideally, both the population and the participation rate increase to increase the size of the market. However, the population increase has to come from increases in both the age and ethnicity segments who have an interest and ability to play golf. The participation rate is influenced by a number of factors, some of which are outside the control of the industry.

Frequency of Participation

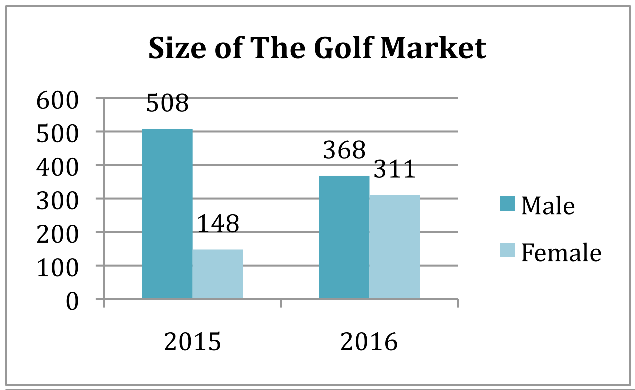
While the number of people playing golf is of interest to the golf industry, most courses measure their success by the number of rounds played since this impacts their bottom line. Vividata provides information on how many rounds are played by three different segments of the golf market – Infrequent (1 -2 times past 12 months), Casual (3 – 9 times) and Core (10+ times)



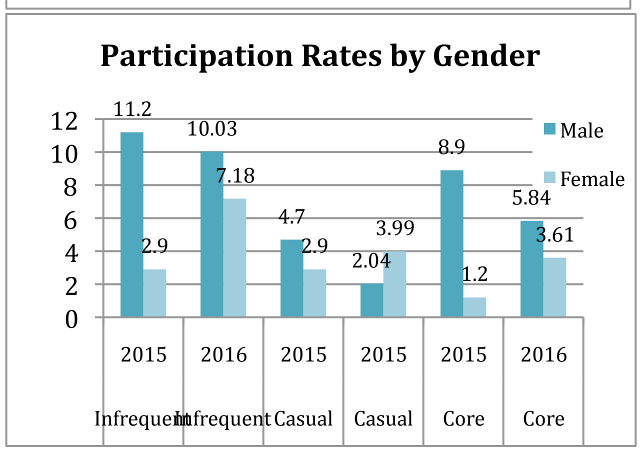
There are far more Infrequent golfers than Casual and Core golfers combined. This is positive in that there is a pool of golfers who have tried some aspect of the game and who might be convinced to play more rounds in a year. The number of Infrequent golfers increased significantly in 2016 and this increase accounts for all of the increase in the size of the golf market shown in the previous chart. The number of both Casual and Core golfers declined in 2016. This is of concern as these two segments represent the most rounds played.



The adjacent chart shows the impacts of these changes. While the participation rate, and the size of the market increased, the total number of rounds declined from 4.5 million to 4.3 million.[3] Thus the increase in the number of golfers had a positive impact on rounds but not to the extent that might have been expected. Clearly, Core golfers have the largest impact on rounds played representing about ¾ of all rounds played and any decrease in the number of Core golfers significantly impacts on rounds played.



Gender



The adjacent charts shows the size of the male and female golf markets. Prior to 2012, the number of women playing golf in BC had been declining, but in the period 2012 to 2015 has leveled off. The increase in the size of the golf market in 2015 was largely due to an increase in the number of

[3] Based on Infrequent golfers playing 1.5 rounds, Casual golfers playing 6 rounds and Core golfers playing 15 rounds in the previous 12 months. Changes to any of these would change the total number of rounds played, but the same averages are used for both years for comparison. The average number of rounds played by Core golfers can be determined from other data.

male golfers while female participation increased only marginally.

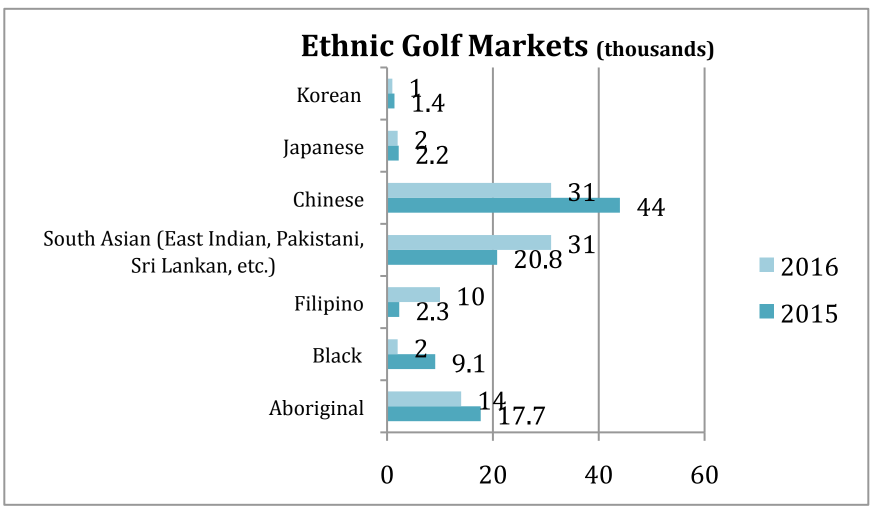
Several prior annual market reports have examined the issue of gender and particularly the decline in the number of women playing golf both on a national and provincial basis.

In 2016, this trend has reversed, with the number of women golfers increasing significantly (more than doubling), while the number of male golfers declined.

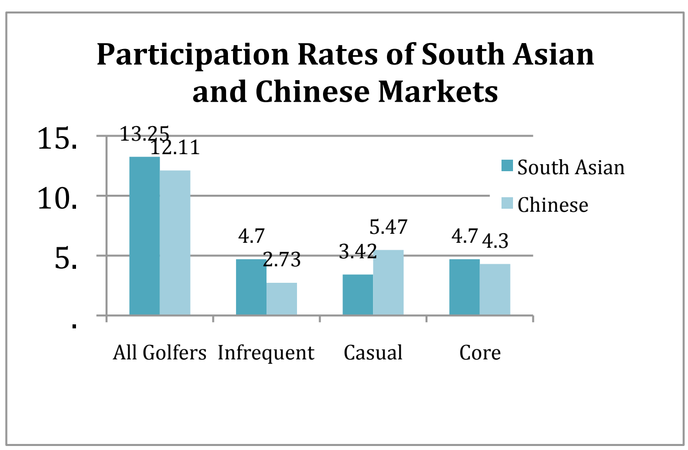
The above chart provides more information. The participation rate in all 3 categories of frequency for males declined from 2015. The participation rate for all 3 categories of participation for females increased. This signifies that not only are there more female golfers in 2016 over 2015, but that increases are found at all levels of participation. Whether this change is the start of a new trend, or is a temporary one, remains to be seen in subsequent data. Ideally, this would be tracked on a quarterly basis as it is an important issue and worthy of more analysis.

Ethnicity

The size of the individual ethnic groups in BC is shown on page 2. Ethnic populations represent approximately 1.1 million BC residents and 28% of the population.



The adjacent chart shows the size of the golf market of each of the ethnic groups and compares data from 2015 to 2016. However, the sample size for many of the groups is very small and care must be taken in interpreting this data. Ethnicity is a relatively recent inclusion in Vividata. The aboriginal market is the next largest ethnic population, representing 14,000 golfers, down from 2015.



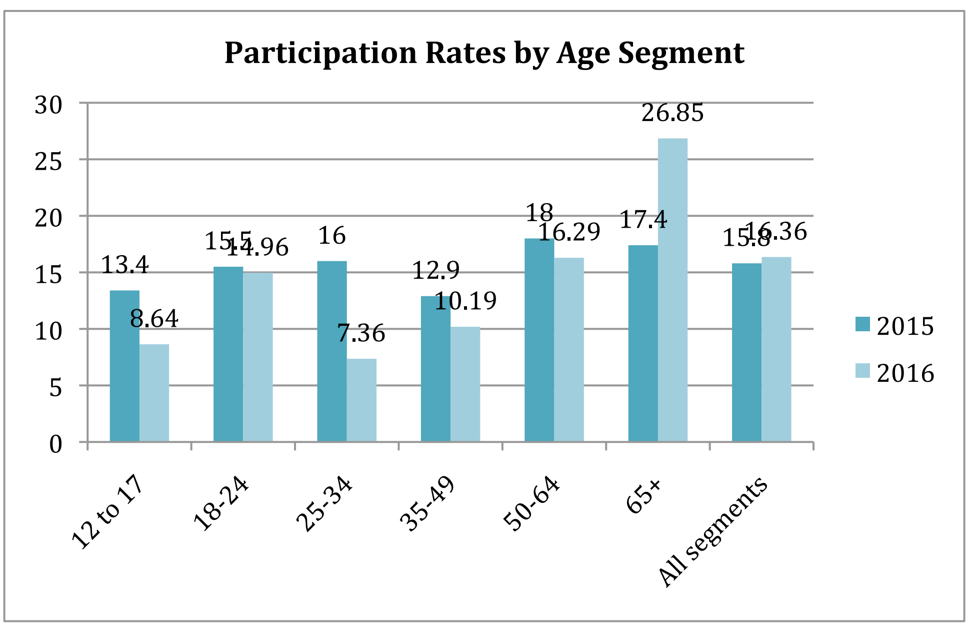
The Chinese golf market was the most important of the ethnic groups, representing 44,000 golfers in 2015, but it appears that this number declined in 2016 to 31,000. In contrast, the South Asian golf market increased over 2015 and is now as large as the Chinese market in 2016. These are the only two groups which should be considered in further detail. The other ethnic groups are not large enough to use for further analysis. Over the longer term, data on all ethnic groups will become more reliable.

The participation rates of the Chinese and South Asian markets are close, but both are lower than for Whites (17.45%) and lower than the average for all BC residents (16.36%). It appears that the Chinese market has more Casual golfers and fewer Infrequent golfers than the South Asian market but the participation rate for Core golfers is about the same for both markets.

Immigration and ethnicity are of importance to the golf industry. Ethnic populations represent an opportunity for growth in the game, and adoption of the sport by ethnic populations could address the gradual, long-term decline in the market of current golfers as the population ages. While observation at member clubs and in the results of tournaments suggests that the sport is being taken up by some ethnicities, little else is known about their participation in golf.

Age

Previous data and reports have shown the significant relationship between age and golf participation. This chart demonstrates clearly the relationship.



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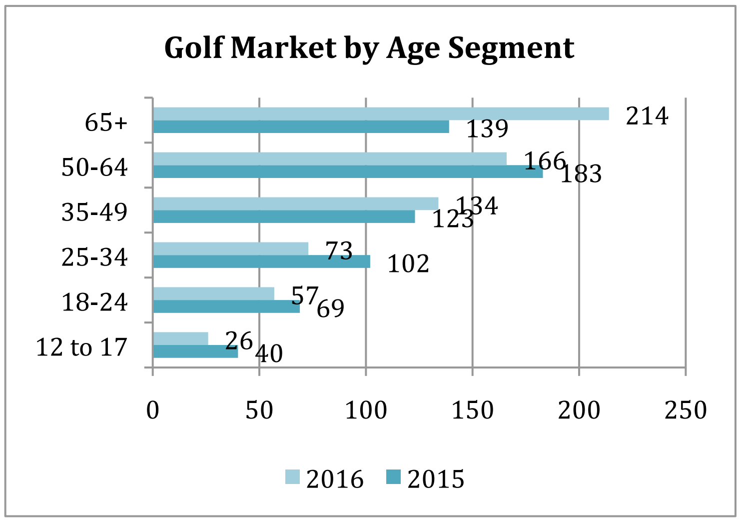
In 2016 there were some significant changes from 2015, particularly in the large increase in participation of those 65+ years of age. The data from 2015 is more typical of that found in prior studies, with the highest rates of participation found in those 50 – 64 years of age, followed by those over 65. The 2016 data is notable for declines in the participation rate of those in the middle age segment (25 to 64) and particularly for the decline in the family/household development segment of 25 – 34 which declined by more than ½. The participation rate of Juniors also declined significantly from 2015 which is alarming and requires further analysis. The increase in the participation rate of those 65+ compensates for the declines seen in the other segments, and is the sole contributor to the overall increase in participation.

While there are differences between each of the age segments in participation rate, there are also differences in the size of each of the age segments. Some segments represent only 6 years of age, others 14 which makes comparisons between the sizes of the markets difficult.



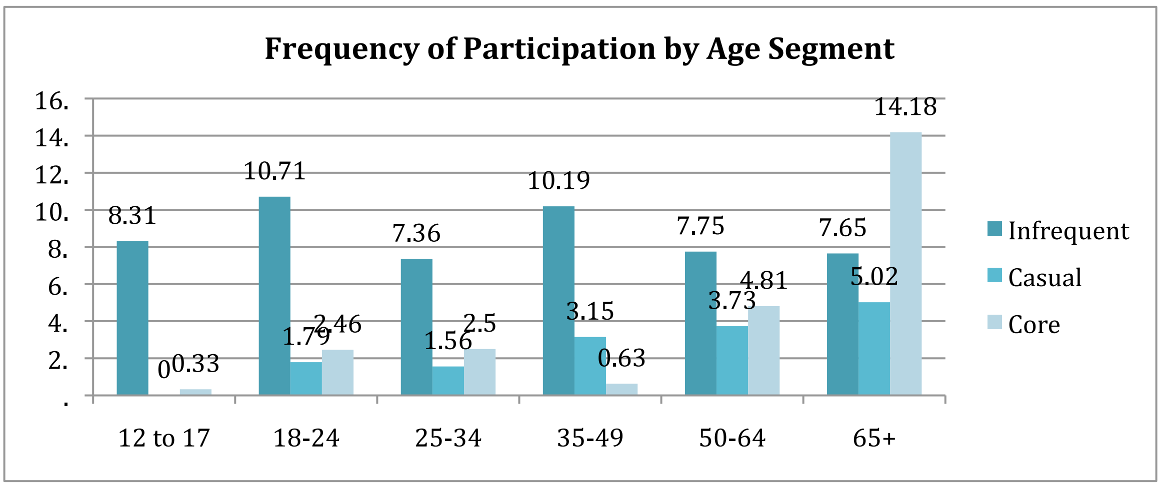
The adjacent chart shows the size of each of the market and changes from the 2015 data. A small part of changes in the size of the age segments can be attributed to changes in the age of the population. As the BC population ages over the next 20 years (or more), the number of those in the 65+ segment will increase. The movement of the large Baby Boomer age segment is now about ½ way into the 65+ age segment.

In 2016, the number of golfers in the 65+ age segment increased significantly to 214,000 as would be expected given the increase in the participation rate. Golfers in this age segment now represent 31.5% of all golfers which has significant implications for the golf industry for marketing and product development if this trend continues.

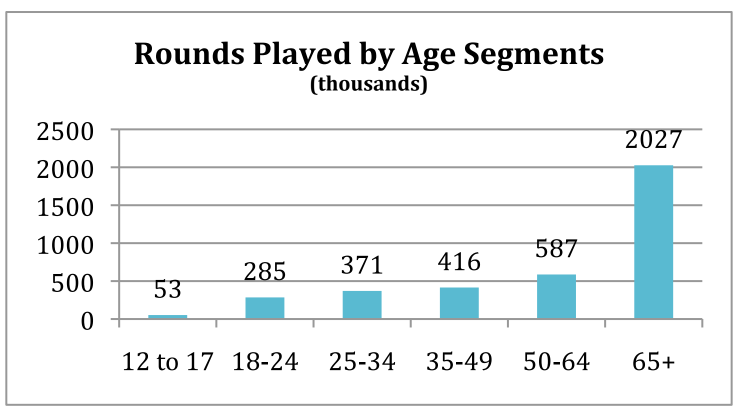
Of concern are the declines in the youngest age segments and particularly the youngest age segment which saw a decline of 35% in the size of the segment. The golf industry has invested resources into developing new golfers in this age segment, but is not seeing at this point the returns on this investment.

The chart on the following page shows the frequency of participation of each of the age segments. As noted in the prior section on frequency (page 4), the number of rounds played is as important as the number of golfers. Across all age segments, except for those 65+, there are more Infrequent golfers than Core golfers. This is particularly discouraging for Junior golfers as the research does not pick up a significant number of Core Junior golfers. While there obviously are Core Junior golfers, there are not enough at a provincial level in the sample to be measurable in this data source. In the 2015 data, the participation rate of Core Junior Golfers was 1.5% compared to the .33% in 2016 so that the low rate does not appear to be an anomaly. While the data should be viewed with caution, the data suggests there are about 26,000 Junior golfers in BC almost all of whom are Infrequent golfers.

On the other hand, most golfers 65+ are Core golfers. This would be expected as those 65+ are probably retired and have more discretionary time available to have played more than 10 times over the previous 12 months. Another positive finding is the frequency of participation of Core golfers in the 50 – 64 age segment at 4.81% as these golfers will hopefully continue in the game as they age and increase their participation when they move into the older age segment.



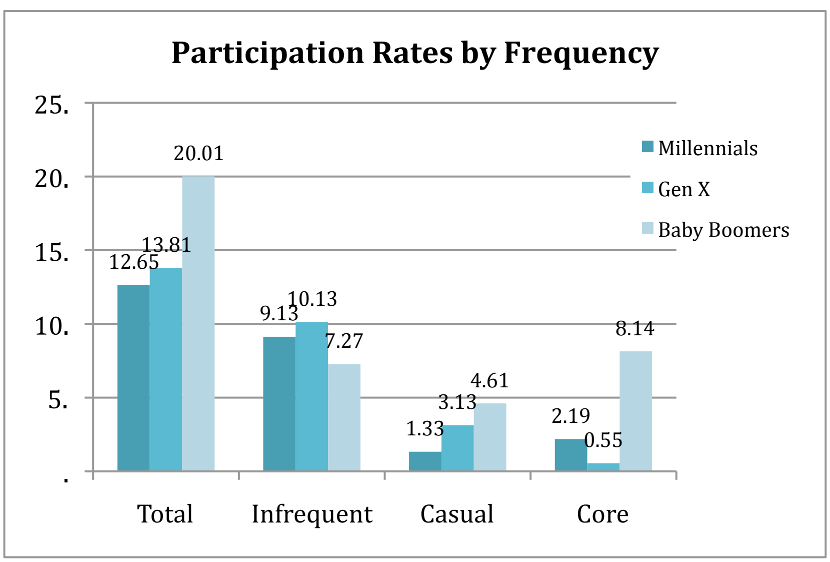
The adjacent chart shows the impact of the size and frequency of play of each of the age segments. This analysis uses the same process as that shown on page 4 (note the footnote on page 5) to apply an average number of rounds played to each of the Infrequent, Casual and Core segments, multiplied by the number of golfers in each age and frequency segment. Based on this data and process, the chart shows the number of rounds played by each age segment.



The number of rounds played by those 65+ represents over 50% of rounds played by all golfers, and the number is likely higher than shown. The number of rounds played by Core golfers age 65+ is 1,695,000 which represents 45% of all rounds played by BC residents. The number of rounds played by all Core golfers is 2,578,000 which is nearly 70% of all rounds played by all BC golfers.

This data and analysis shows clearly that there is an established core market for golf, consisting mostly of those currently who are Core golfers and those over the age of 65. This is a positive finding in most respects as it indicates that there is a level of commitment to the game among its consumers. In addition, the high participation rate among those 65+ is also positive as this age segment will continue to grow in size as Baby Boomers age and more move into this age segment. Golf will increasingly become a game for seniors. As they age however, a challenge for the industry will be to offer a product which meets their changing needs in order to retain them in the game for as long as possible. It is possible to forecast the size of the golf market out to 2030 using population forecasts and current participation rates for each age segment. This is an invaluable planning tool as it shows the demand for golf product and whether there are enough courses of the right type. This analysis would help to forecast future demand for the golf product in BC and the age segments that will be playing golf.

The downside of this analysis is that while there are 300,000 Infrequent golfers, representing 44% of the total golf market, Infrequent golfers represent only 450,000 rounds or 12% of the total number of rounds played. There are 118,000 Casual golfers, but they represent 709,000 rounds or 19% of the total rounds.

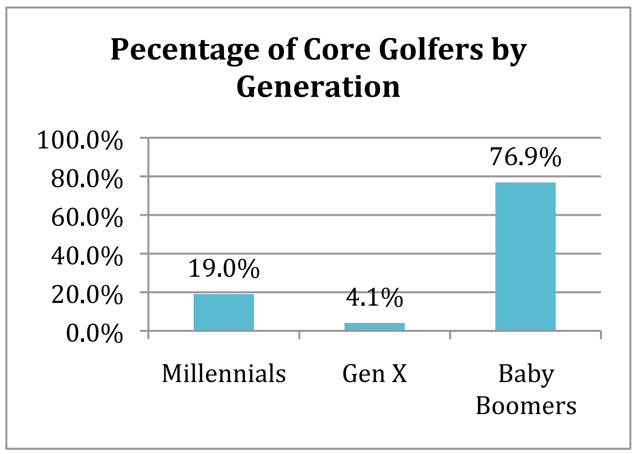


The challenge for the industry, as has been identified in previous reports, is to increase the number of rounds played by Infrequent and Casual golfers. While there is a direct benefit obtained by increasing rounds played by Infrequent golfers, there is an additional benefit of increasing the level of engagement of golfers. As they play more, they will likely enjoy it more (hopefully!) and become more engaged in the game over their lifetime.

For the first time, Vividata has provided information on the participation in golf by "generational" segments – Generation X, Millennials and Baby Boomers. Most marketers use these segments to define target markets. Millennials were born between 1982 and 2001, Generation X between 1965 and 1981 and Baby Boomers between 1945 and 1965. There are currently 162,000 Millennial golfers, 150,000 Generation X golfers and 278,000 Baby Boomer golfers in BC.

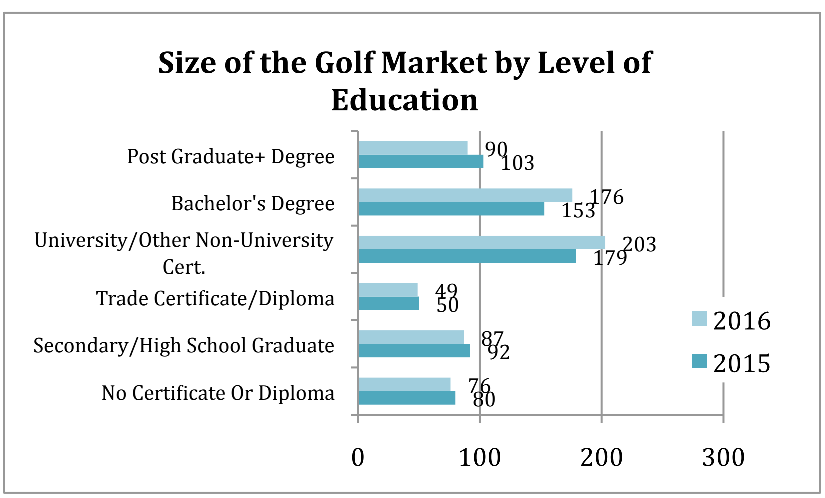
The participation rate for the 2 younger age generations is much lower than for Baby Boomers (and is about the same as for both Chinese and South Asian ethnic groups!) and the 20% participation rate for Baby Boomers indicates the importance of this segment to the golf industry. This is particularly important given the size of the population in this age generation. This chart also shows that most Generation X and Millennial golfers are Infrequent golfers, with few Core golfers.

The previous section on the number of rounds generated by age segment shows the importance of Core golfers in generating revenues for the golf industry. Looked at another way, this data also shows the high percentage of Core golfers who are Baby Boomers, representing 80% of all Core golfers. The percentage of Core golfers who are in the Millennial generation is important, but at a much lower level. There are 113,000 Core Baby Boom golfers and 28,000 Core Millennial golfers.



Education

The level of education, and as will be shown later, household income, are also important factors in determining participation in golf. This has been demonstrated in past reports.



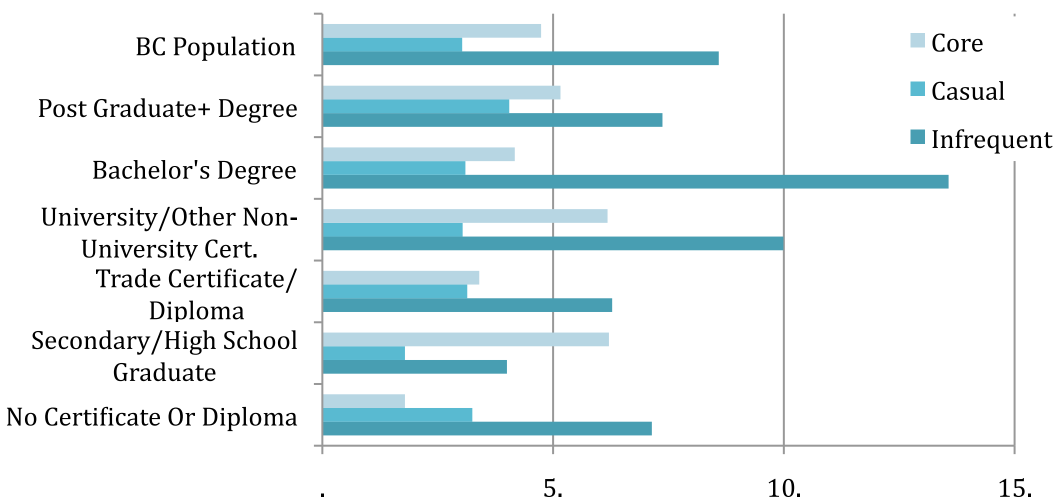
The above chart shows the size of the golf market for those in different education categories. It should be noted that this data includes those who are 12 – 17 years of age and who would likely indicate that they don't have a certificate.

There have been two significant changes between the 2015 and 2016 data. The number of golfers with either a Bachelor Degree or a University certificate have both increased while there have been slight declines in the other education categories.

The largest market segments for the golf industry are those with advanced education. There is a relationship between level of education and household income, and as will be examined in the next section, income also plays a role in determining golf participation.

The next chart is a little more complex and has a data table to help show the levels of participation by education segments. Unlike the prior chart, this chart shows the participation rate for Infrequent, Casual and Core golfers by level of education. The chart also shows the participation rates for the population to provide an easier comparison.

Participation Rate by Level of Education



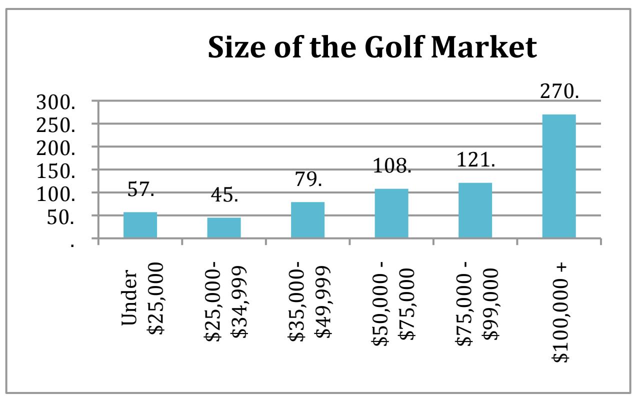
	No Certificate Or Diploma	Secondary/ High Schoo Graduate	Trade Certificate/ Diploma	University/ Other Non-University Cert.	Bachelor's Degree	Post Graduate+ Degree	BC Population
Core	1.79	6.21	3.4	6.18	4.17	5.16	4.74
Casual	3.25	1.79	3.14	3.04	3.1	4.05	3.03
Infrequent	7.14	4	6.28	9.99	13.57	7.37	8.59

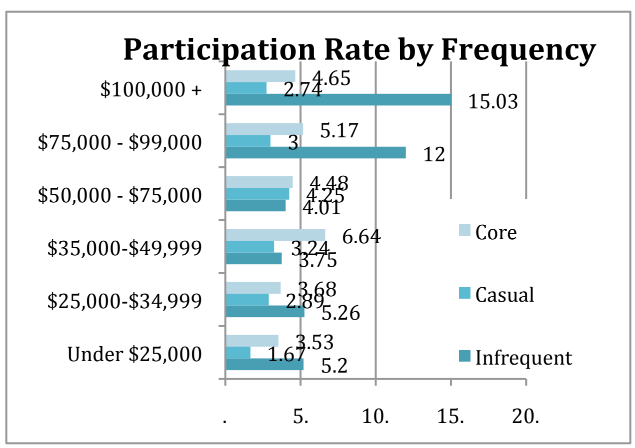
Those with higher levels of education have higher rates of golf participation overall, with both those with Bachelor Degrees and University certificates having participation rates of approximately 20%. However, both of these segments have approximately ½ of their golfers as Infrequent golfers with both having participation rates above the average of all golfers. In the more important Core golfer category, the highest participation rates are found among those with High School graduation and those with University certificates, followed by those with Post Graduate Degrees.

The high level of participation as Core golfers of those with High School graduation might be due to availability of time. This data does not provide this answer. However, those with High School graduation, and not higher levels of education could be attributable to their likely younger age which could mean they are still in school (or are unemployed) and have more time to devote to golf. They would also be considered as juniors at most clubs and golf participation would be less expensive.

Household Income

As noted previously, household income is also a strong factor in influencing participation in golf. The adjacent chart shows that there are 270,000 BC golfers living in households with incomes above $100,000 which represents 40% of the golf market. Another 121,000 or 18% of golfers, live in households with incomes over $75,000. There are just over 100,000 golfers living in households with less than $35,000 in income. It is possible that most of these golfers would be younger and possibly students.



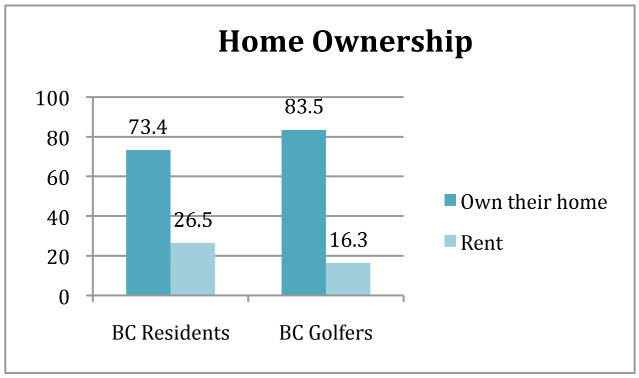


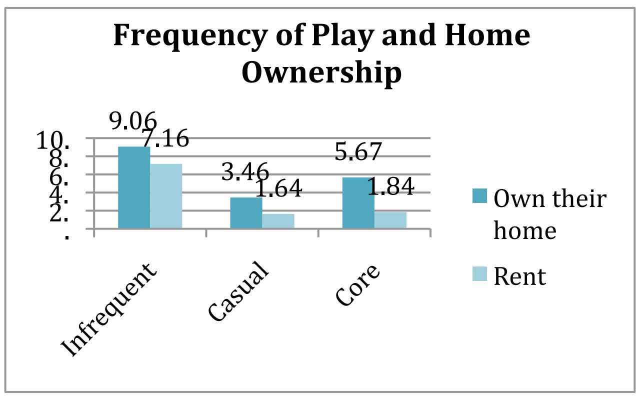
The adjacent chart shows the participation rate for each of the different income segments. The average participation rate in this data is 16.36% with only the two highest income segments over the average. Generally, participation increases with household income. While the high participation rate of 22% in the highest income bracket is positive in that the golf market is well off financially the data also indicates that those in lower income brackets are much less likely to be able to participate in golf.

While those in higher income brackets are most likely to participate in golf, it doesn't mean that they are Core golfers. As shown in the above chart, in both of the two highest income brackets, more than ½ of golfers are Infrequent golfers. There is a higher percentage of Core golfers in the \$35,000 to \$50,000 range. This translates into 39,000 Core golfers in this income bracket. Due to the size of the market, there are 56,000 Core golfers in the highest income bracket, so this remains the most productive income segment for the golf industry.

Home Ownership

Home ownership is an indication of a number of socio-economic factors as it is based on age, income and location. It is a significant issue as the cost of buying a home has increased significantly, particularly in the Greater Vancouver area. It is important for the golf industry to understand this market issue as it is important information to be able to provide to potential sponsors and business partners.



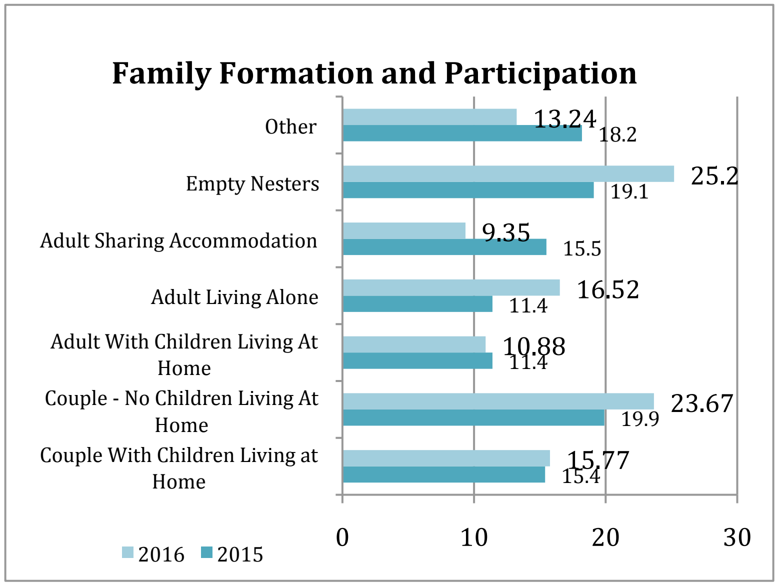


Among all BC residents, just over 73% own their homes. Among all BC golfers, 83.5% own their homes which is significantly greater than the average. This indicates that golfers are a good market for advertising, sponsorship and partnerships for many businesses such as home renovation or real estate agencies.

Home ownership also impacts the frequency of play. Among all golfers (owners and renters), 4.74% are Core golfers. Among owners, 5.67% are Core golfers while few renters are Core golfers. Among all golfers, 8.6% are Infrequent golfers while 9.06% of home owners are Infrequent golfers.

Family Status

Family status relates to the number of people, and the age of the people (primarily children) living in a household. Family status has an obvious relationship with age and to some extent with household income.



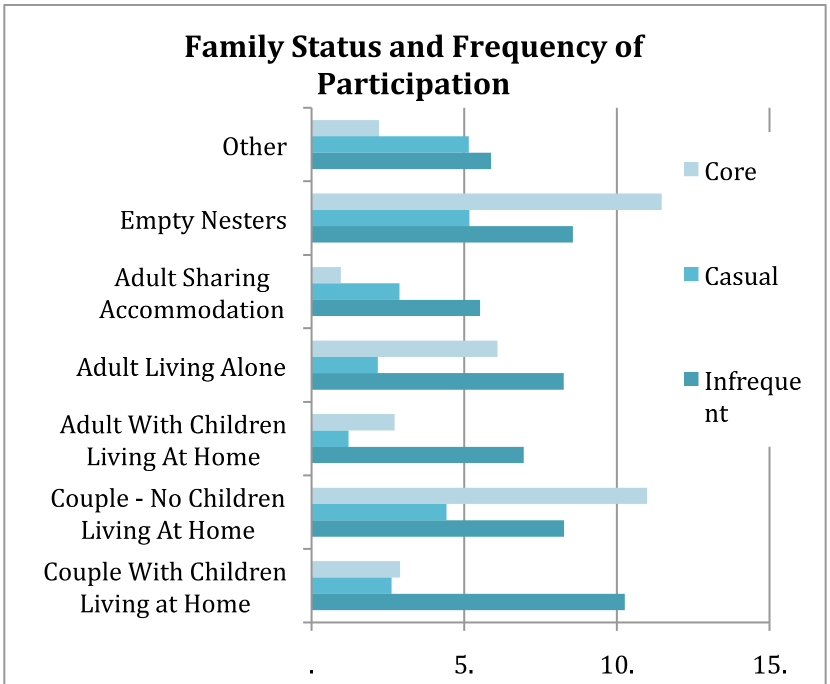
Past research has shown that family status plays an important role in determining golf participation. As previously shown, golf is played by those with higher incomes and older people play golf to a much greater extent. Both of these relate to family status as older people tend to have better incomes, at least until retirement. In addition, discretionary time is an important factor.

The highest participation rates are found in households without children in the household – well above the average of all BC residents. Empty nesters in pre-retirement or retirement have the highest participation rate at 25% while couples with no children living at home are at 24%. This segment could either be young couples or couples who in all age segments who don't have children. In comparison, couples with children in the household have a 16% participation rate. Adults living alone have the next highest participation rate at about the average. Combined, these three segments represent 441,000 golfers or 65% of all golfers.

The largest family status segment is couples with children living at home. There are 1.8 million residents in this segment of whom, 283,000 are golfers. Their participation rate is slightly below the average at 15.8%. This segment includes those between about 25 and 50 years of age and key issues for this segment will be time and money.

The next chart shows the relationship between family status and frequency of play.

This chart shows that the largest segment – couples with children – have a high participation rate as Infrequent golfers, and lower rates as Core or Casual golfers. Of the 283,000 golfers in this segment, only 52,000 are Core golfers while 184,000 are Infrequent golfers.



	Couple With Children Living at Home	Couple - No Children Living At Home	Adult With Children Living At Home	Adult Living Alone	Adult Sharing Accommodation	Empty Nesters	Other
Core	2.9	10.99	2.72	6.09	0.96	11.47	2.21
Casual	2.62	4.42	1.21	2.17	2.88	5.17	5.15
Infrequent	10.26	8.27	6.95	8.26	5.52	8.56	5.88

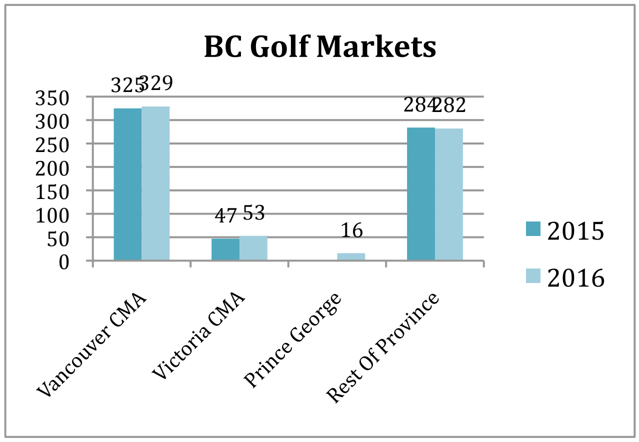
The participation rates of the three segments who don't have children living at home as Core golfers is much higher at between 6% and 11%. Of the 197,000 Core golfers in BC, 168,000 are couples without children living at home or empty nesters.

Family status is partly a function of age, particularly for empty nesters. While the largest market segment are the couples with children living at home, converting this segment into higher levels of participation could be difficult given the barriers to their participation.

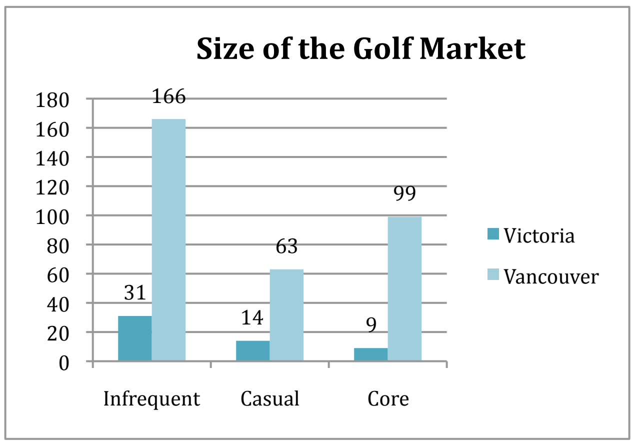
Location

The following chart shows the location of golfers in the province. For the first time, Vividata has included information on the Prince George area which shows 16,000 golfers in that area.

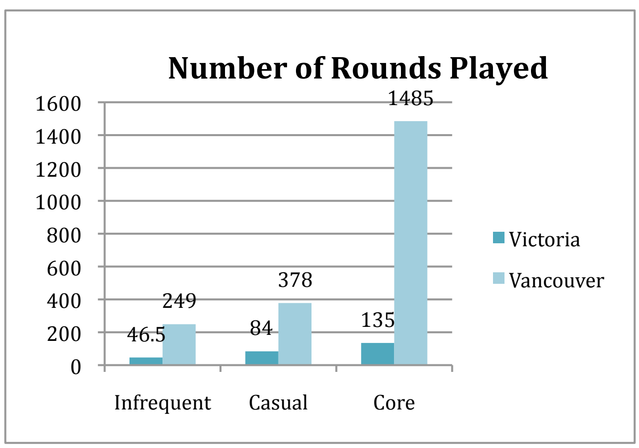
The size of the golf markets in Vancouver and in Victoria has not changed significantly from 2015. The Vancouver market increased by 4,000 golfers and the Victoria market by 6,000 golfers. In the 2015 data, Prince George is included in the "rest of the province" data. The breakdown into these markets is largely a function of sample size, and there may be more individual markets shown in the future. Unfortunately, the sample size for Prince George is too small to break down further.



As noted in previous sections, the frequency of play is an important factor. In the Vancouver market, 30% of golfers are Core golfers while in the Victoria market, 11% are Core golfers. Just over 50% of Vancouver golfers play infrequently while 58% of Victoria golfers play less than 2 rounds a year.



This makes a significant difference in estimating the number of rounds played in each market. Using the same formula as used in the footnote on page 5, an estimation of the rounds played based on the size of the market can be made. This may differ from estimates based on reports from courses depending on the number of rounds played by Core golfers. An increase from 15 rounds per year to 30 rounds per year would be a significant increase. Previous research on BC Golf members indicated that the number of rounds played per year was 60 or about 10 per month in season.



Based on the averages for each market, there are a total of 265,000 rounds played in Victoria and 1.9 million in the Greater Vancouver market. If the number of rounds played by Core golfers is increased to average 30, then there would be 279,000 rounds played by Core golfers in Victoria and 2.97 million by Core golfers in Vancouver. Past research may provide some indications of the number of rounds played by Core golfers. This would have an impact on the number of rounds played in each market and in the province. A better estimate of the number of rounds played by Core golfers could be made from other data sources.

Conclusions

The data for this time frame is generally consistent with 2015 in continuing many trends. There is also some new data, and data which has been analyzed in this report that had not previously been addressed. The Vividata methodology has some concerns but is still the best data source for golf participation that can be obtained on a consistent, timely fashion. Data is available on a quarterly basis for the previous 12-month period about 3 months after the end of the quarter with approximately the same sample size.

Among the notable aspects of the 2016 data:

- The size of the golf market increased slightly in 2016, continuing its upward trend. The participation rate also increased. Both of these are very positive news.
- There are 680,000 BC residents aged 12+ who played at least one round of golf in the previous 12-months prior to September 2016. This is approximately the same number of golfers in the province as at the peak in the early 2000's.
- However, all of the increase in size and participation was due to an increase in the number of Infrequent golfers. This is positive in introducing new golfers to the game, but the drop in Core golfer participation is troubling.
- Core golfers are by far the most important segment in generating rounds for the industry. This has been evident in all previous years. The decline in the number of Core golfers in 2016 was not significant but needs to be tracked due to its impact on the golf industry. As an example, the wet, cold weather in the spring of 2017 will have an impact on the rounds played in this quarter.
- As noted, the increase in the number of golfers was due to the increase in Infrequent golfers. Almost all of the increase in Infrequent golfers was due to the increase in female participation. Again, this is very positive in introducing more women into the game and reverses a trend seen through most of the past 10 years. The number of Core female golfers also increased in 2016 which indicates that females introduced to the game in earlier years have increased their engagement with the game.
- Ethnicity is an important factor in influencing the BC population, but the increases in the size of the ethnic population are not necessarily being translated into increases in golf participation. In the two key ethnic markets –

Chinese and South Asian – the participation rate is still at a reasonable level in comparison to the overall participation rate. Any marketing programs directed at ethnic markets will need to be designed specifically to reflect their cultural interests and other demographic factors.

- Age appears to be the most important factor in determining golf participation. 31% of all golfers are over the age of 65 and more importantly, as this segment is most likely to be Core golfers, they represent (at least) 70% of all rounds played in BC. Developing a better understanding of this market is critical to the health of the industry. Forecasting the size of this market and its impact on rounds played over the next 5 – 20 years is critical to the health of the BC golf industry.
- The number of golfers in the 3 youngest age segments (12 – 35) declined in 2016 continuing at the low levels seen in previous data. The number of Junior golfers picked up in this survey data is at a level where it might not be reportable in future data if it does not increase. The data on Junior golfers is already at a level where it is too small for reliability.
- For the first time, data on the three "generations" is available and should be used to a greater extent in future reports, as they aggregate respondents into larger age segments than found in the age segment data. This format is also used extensively in marketing and is important to develop partnerships with businesses and corporations.
- Household income and education are also influential in determining participation but this data set does not allow identification of participation by generational or age segments. As an example, among Baby Boomers (or 65+) to what extent does income influence participation?
- Family formation or status is probably as important as income and education and also reflects age. Clearly, although most BC residents live in families with children at home, most golfers don't have children in the household. There are a number of factors which could influence lower participation in households with children such as time, and disposable income.
- The estimates for the number of rounds played is largely influenced by the estimate provided for the average number of rounds played by Core golfers. Research that has been conducted in the past may provide a better answer than that used in this report (of an average of 15 rounds). Being able to provide a better estimate for this number is important to assessing trends and making forecasts for the future.
- British Columbia Golf has data available from past survey work that could supplement, and provide a comparison to, this "provincial" data which uses the one data source. The golf industry has undertaken some cooperative research in the past which could be used as a model to obtain better "on-course" information on a range of demographic and participation data on golfers.